

NielsenQ

Find Your Next Growth Opportunity

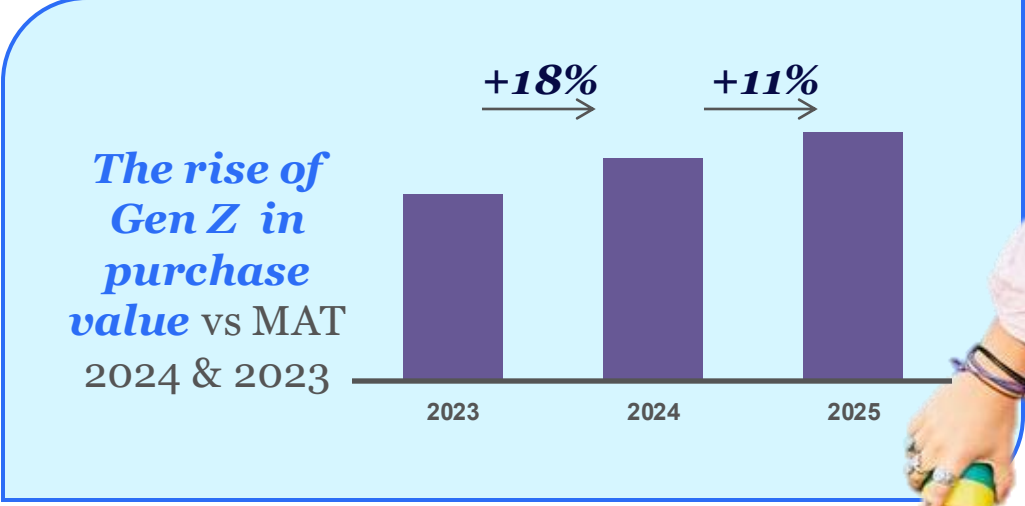
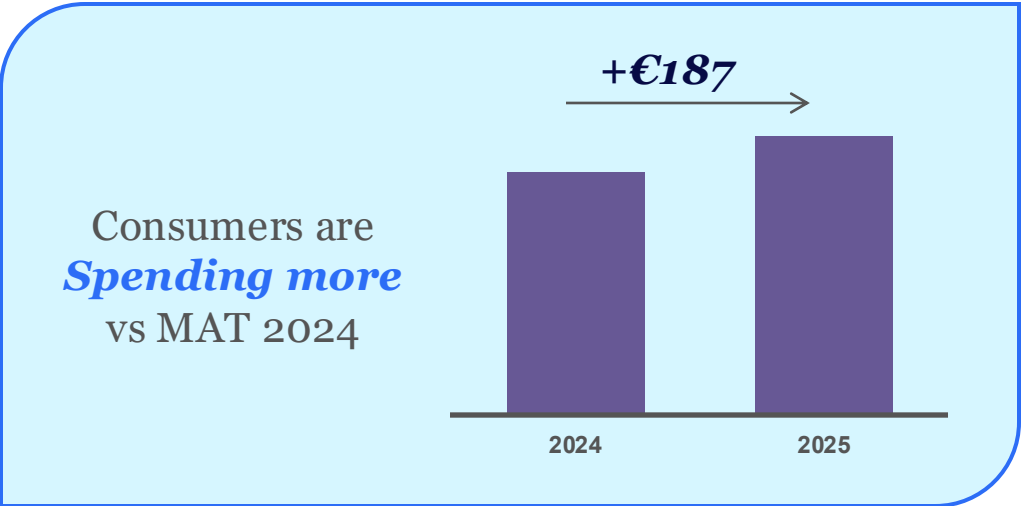
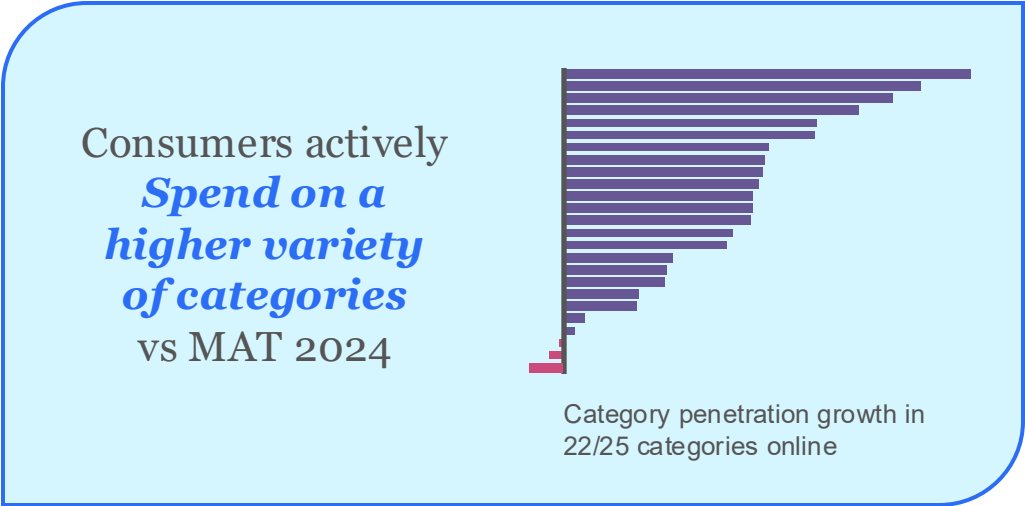
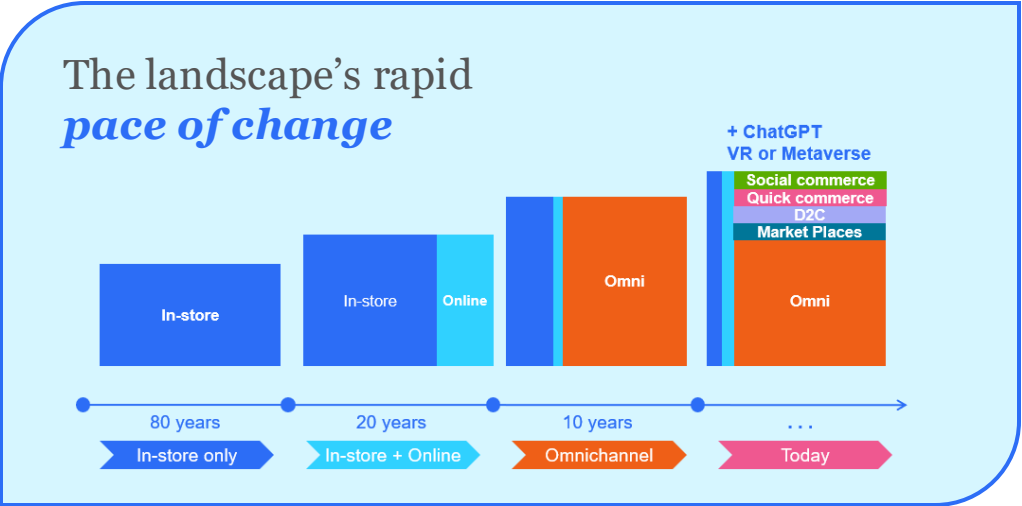
*Decoding the Digital Consumer
and the Rise of Social Commerce*

insight
summit
2025





E-Commerce Expansion in the Netherlands: A Strategic Crossroad for Manufacturers and Retailers

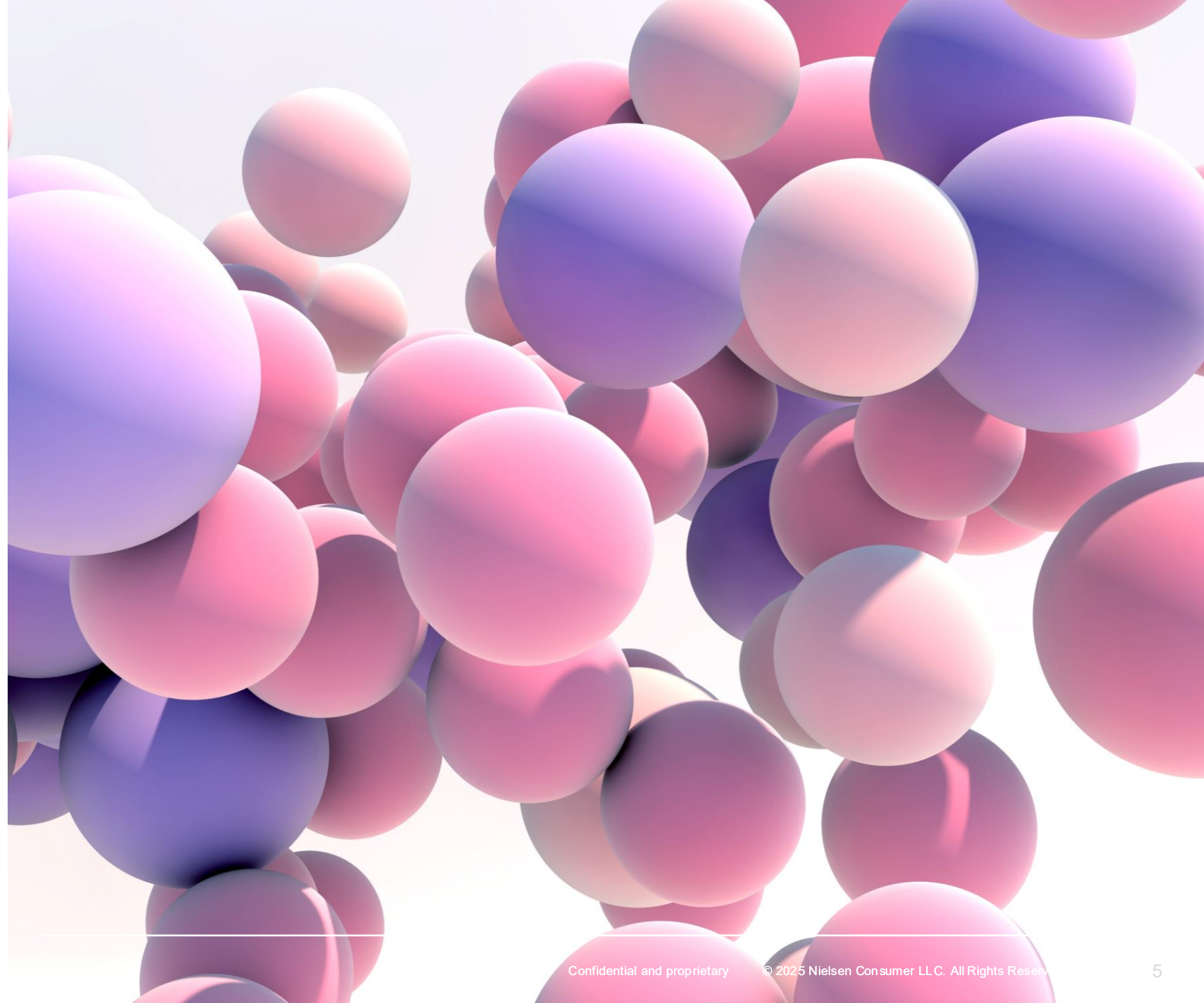


Source: NIQ Digital Purchases, 52w 01.06.25 vs. 52w 01.06.24



Category Pulse: Where E-Commerce is Winning

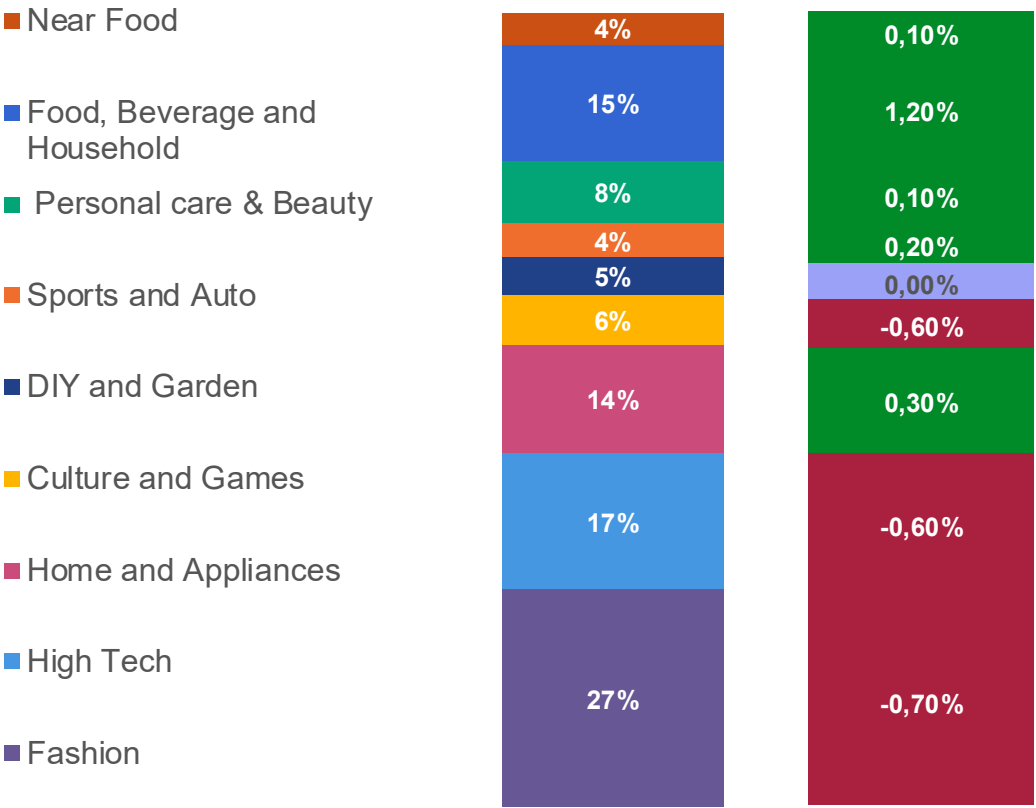
A Deep Dive into Market Share Shifts and Channel Momentum



Shifting Priorities: Dutch E-Shoppers Increase Spend on Everyday Essentials and Self-Care

Weight of super categories in total e-commerce – in value

Total Ecommerce – MAT 2025 vs. MAT 2024



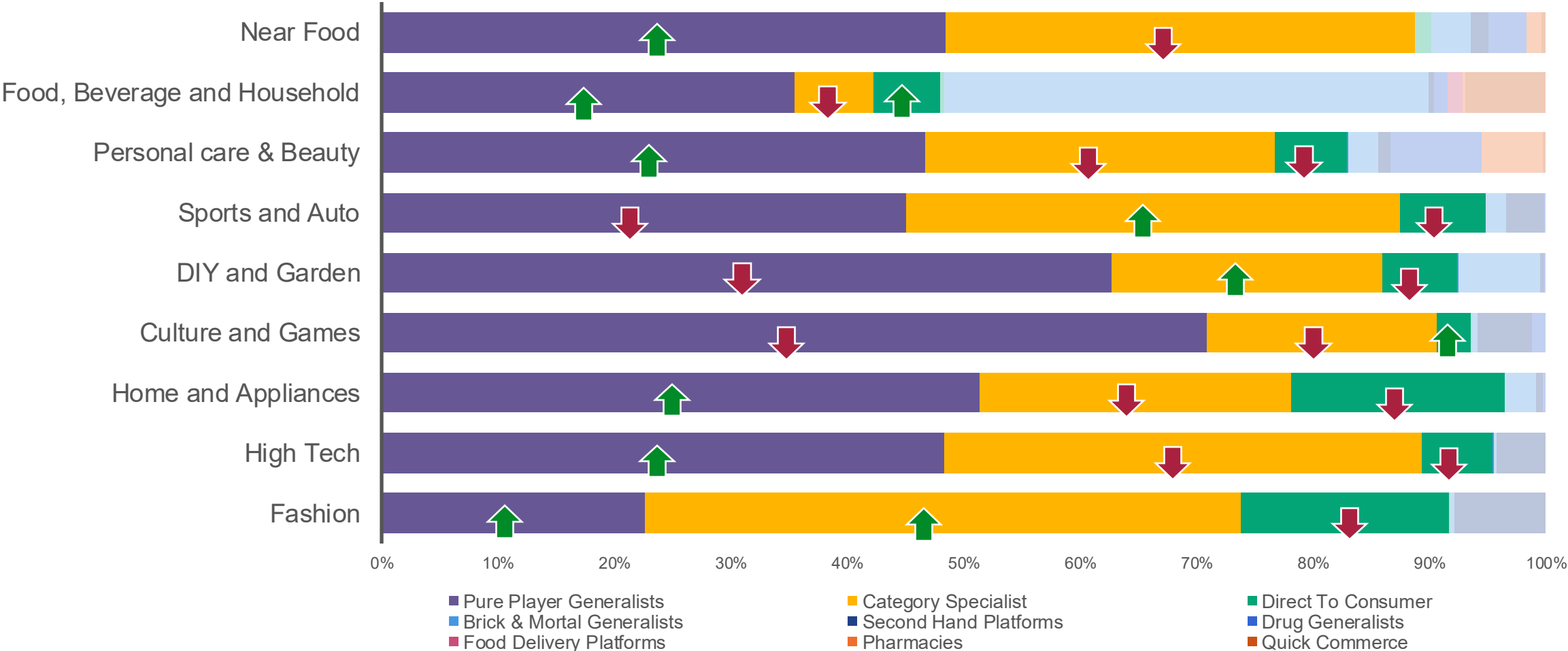
Source: NIQ Digital Purchases, 52w 01.06.25 vs. 52w 01.06.24



The Power Shift Online: Pure Players Dominate Where E-Commerce Thrives

Weight of merchant type sales (services excluded) – in value

Total Ecommerce – MAT 2025

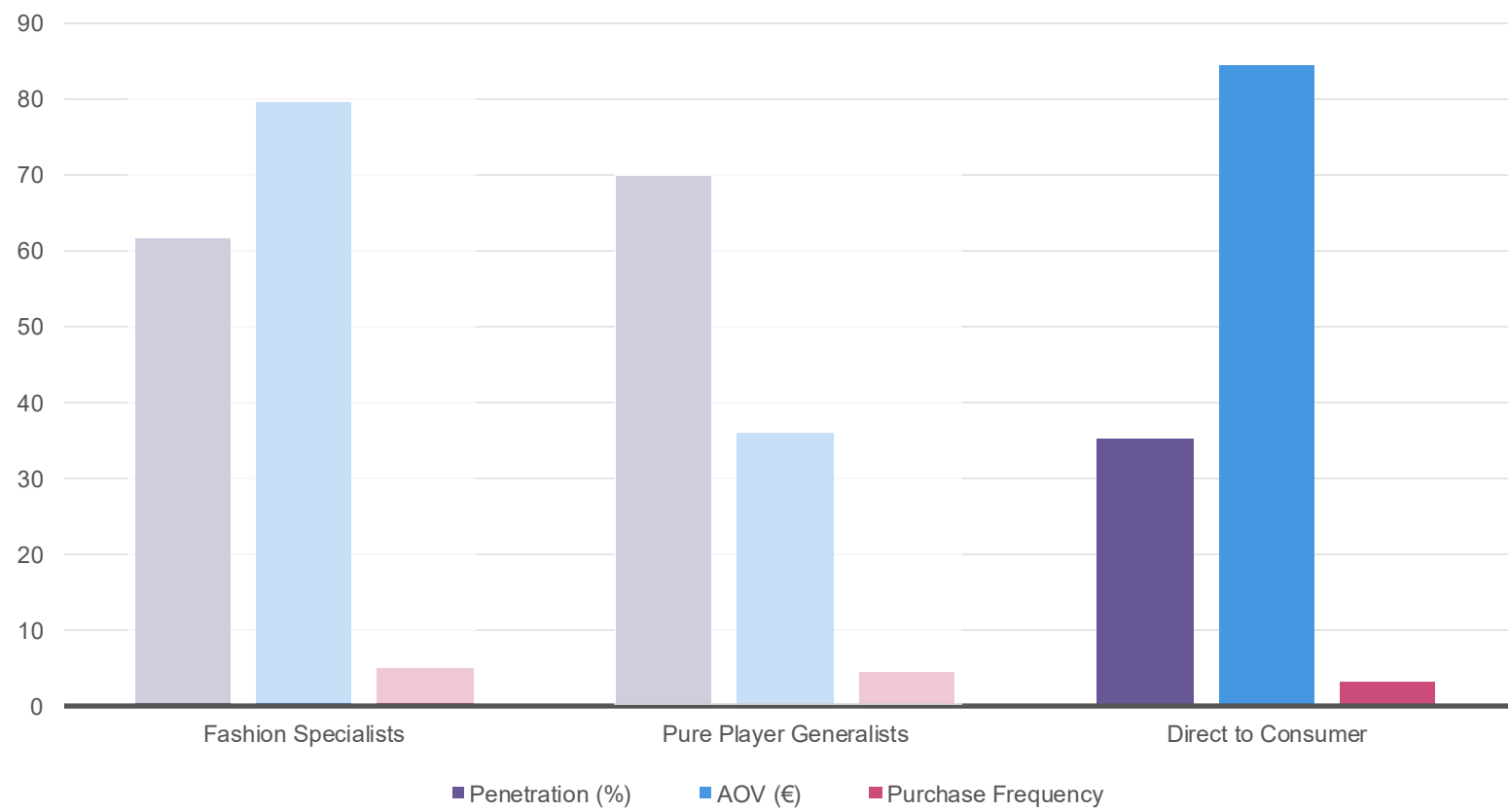


Source: NIQ Digital Purchases, 52w 01.06.25 vs. 52w 01.06.24

The Power of Brand Control: D2C Fashion Dominates in Value per Transaction, with purchase frequency as focus area

Online Channel Performance Drivers – Penetration, AOV & Purchase Frequency

Total Fashion - Ecommerce – MAT 2025



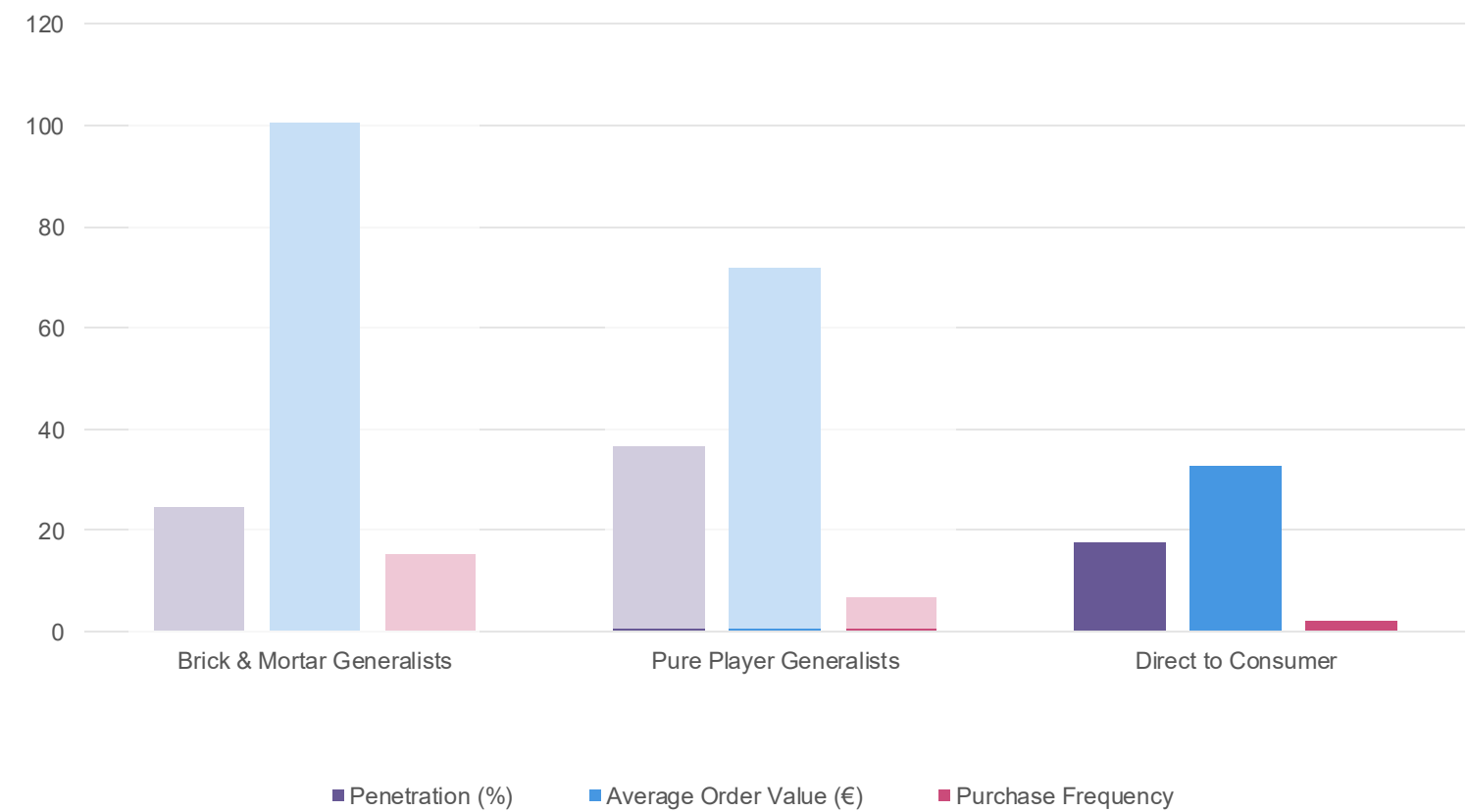
Source: NIQ Digital Purchases, 52w 01.06.24



From Discovery to Dependency? D2C in Food, Beverages & Household Struggles with Repeat Purchases

Online Channel Performance Drivers – Penetration, AOV & Purchase Frequency

Total Food & Beverages - Ecommerce – MAT 2025



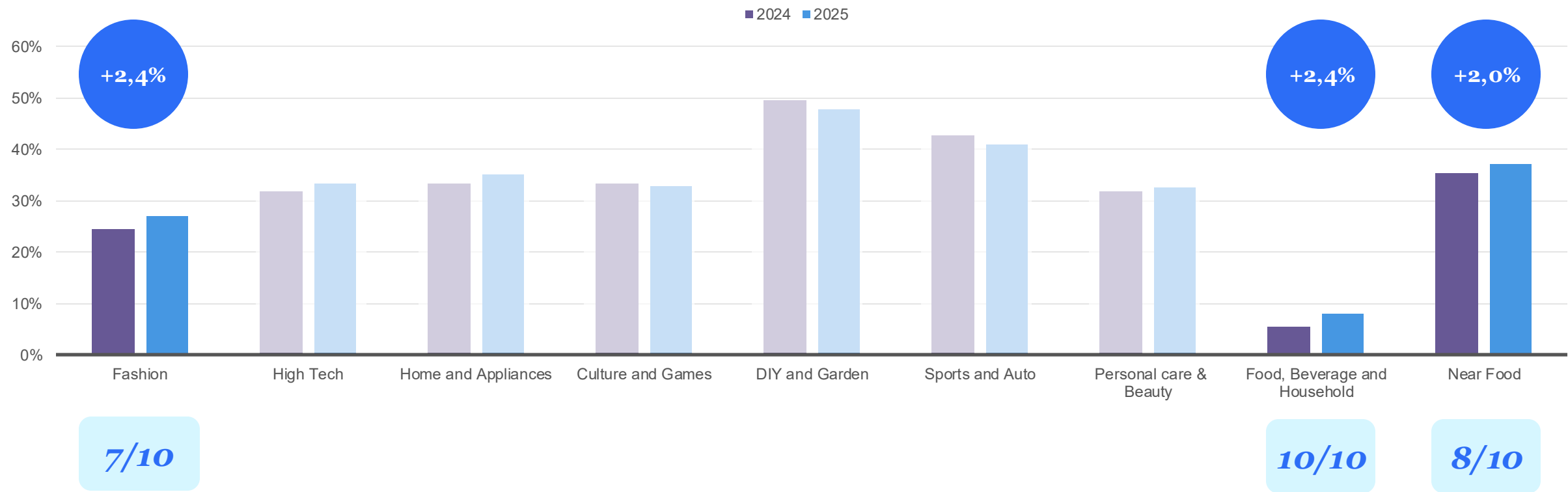
Source: NIQ Digital Purchases, 52w 01.06.24



Market Place Surge: Trusted Retailers Drive Marketplace Expansion

Market place market share of trade in e-commerce sales (services excluded) – in value

Total Ecommerce – MAT 2025 vs. MAT 2024



of known online retailers in top 10 3P category sellers online

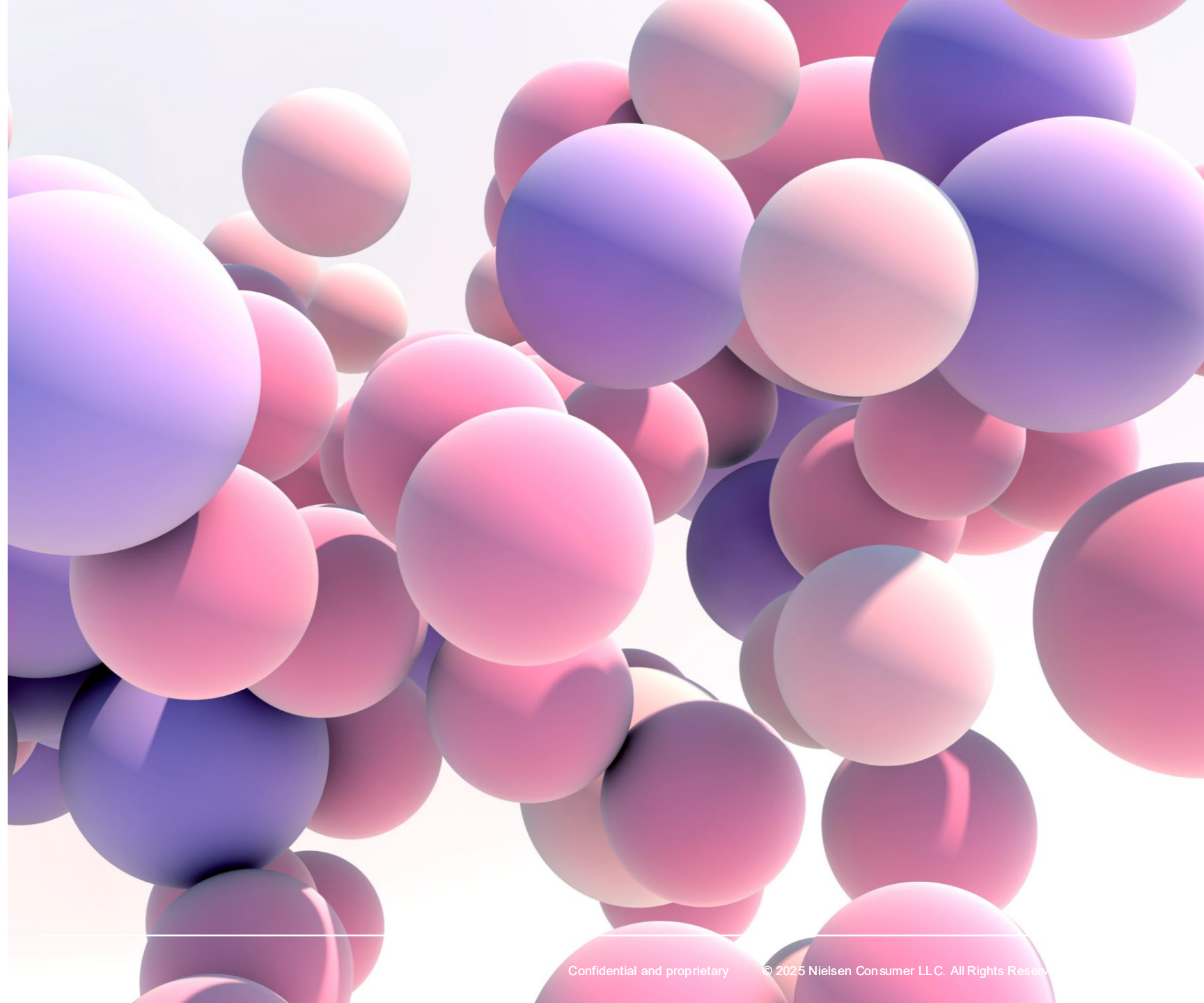
Source: NIQ Digital Purchases, 52w 01.06.25 vs. 52w 01.06.24

From Scroll to Sale: The Rise of Social Commerce and TikTok

Behavioral Insights, TikTok (Shop) Learnings & Crafting your TikTok strategy



NIQ

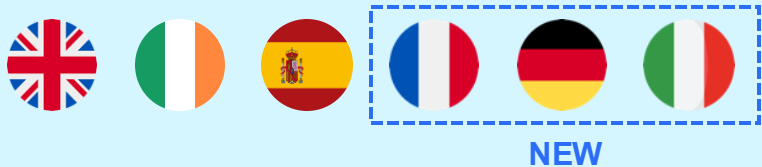


In case you've missed it... what is TikTok Shop?

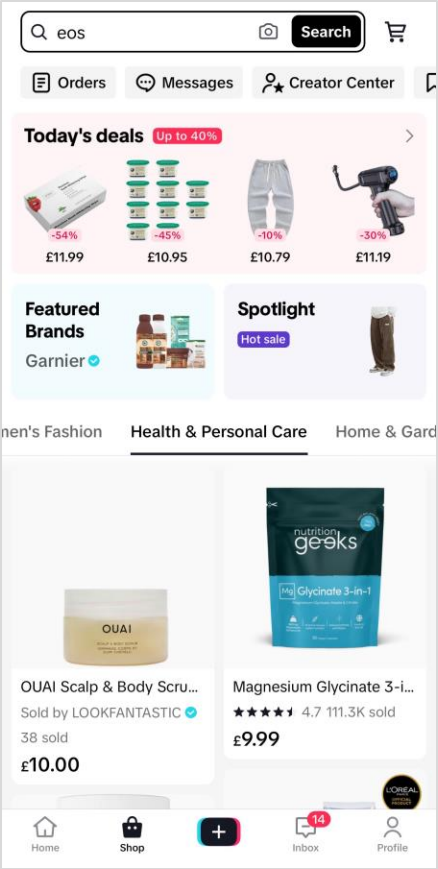


An **integrated e-commerce platform** in the TikTok app.

Users can **search for products** to buy but, most commonly, they are advertised to them by TikTok creators **through short videos**.



TikTok Shop Landing Page



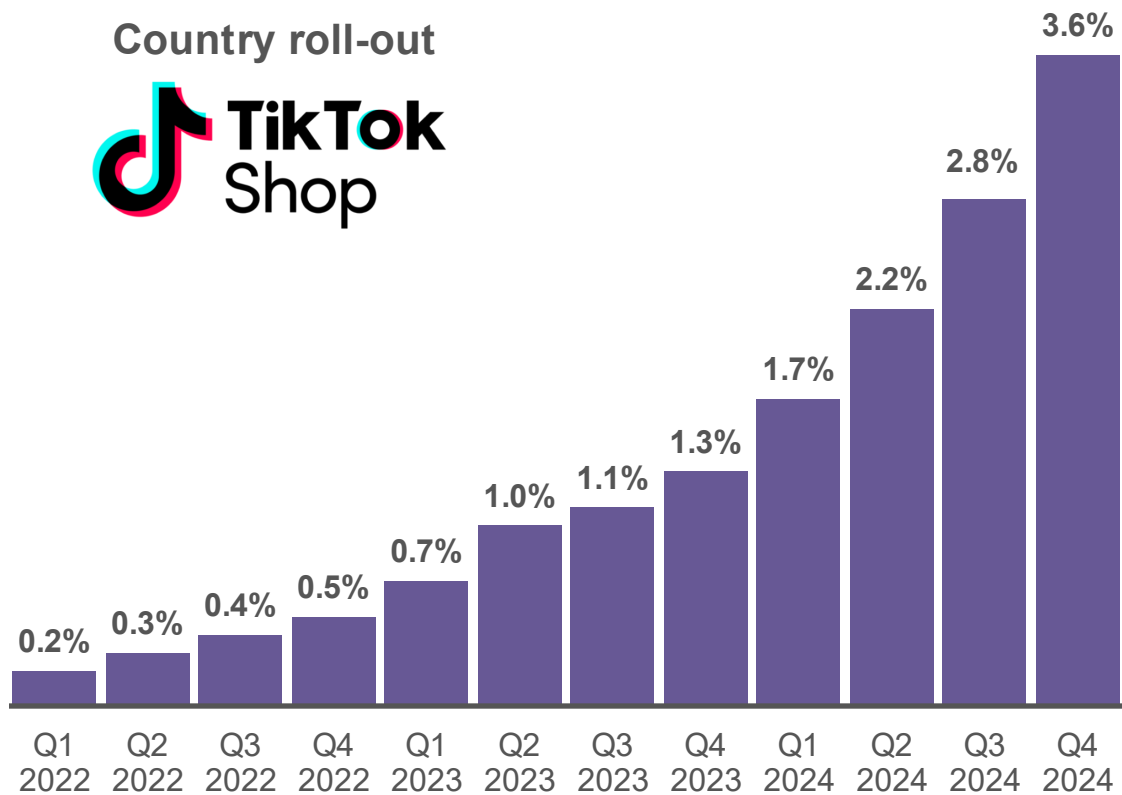
TikTok Shop Live Stream Events

TikTok creator paid videos



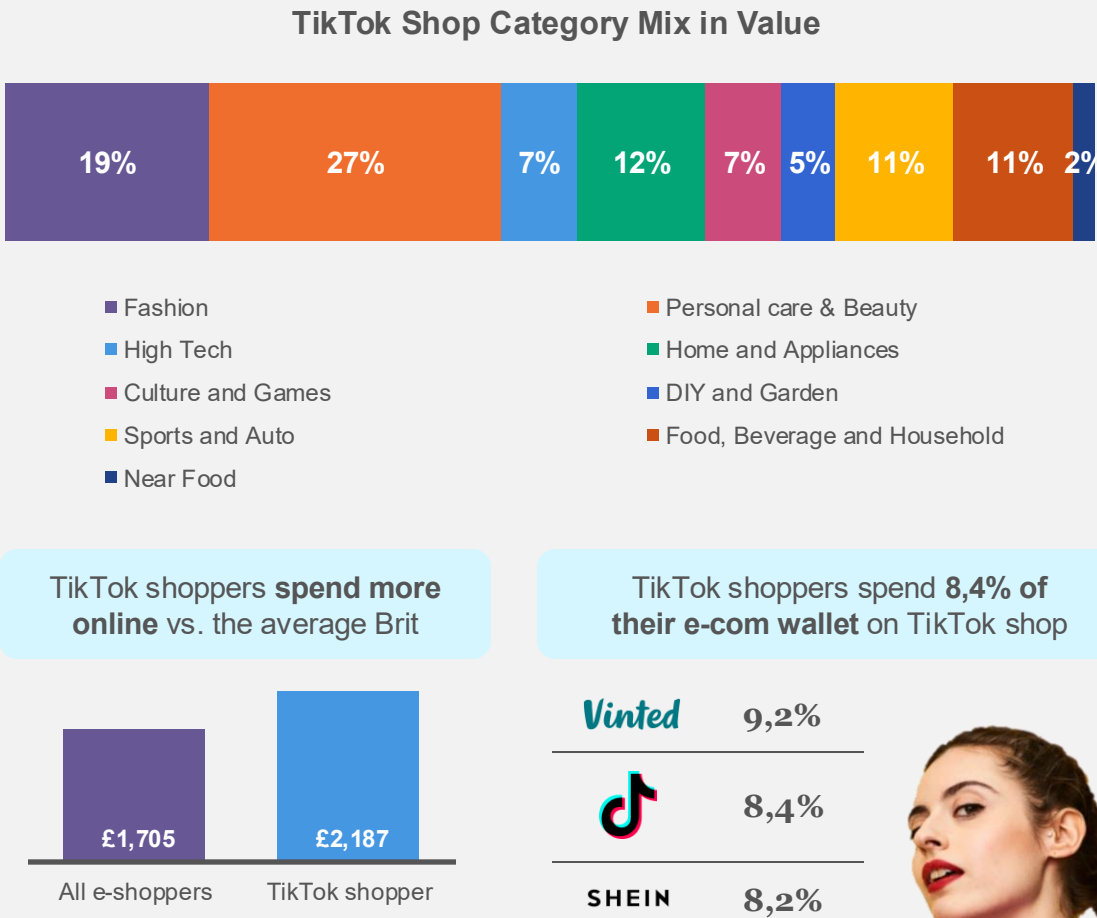
What can we learn from the UK? TikTok has been in its growth stage especially in 2024

TikTok Shop’s Value Market Share | Total Ecommerce | United Kingdom



Source: NIQ Digital Purchases | Total Ecom UK | Value Market Share | TikTok | Data from 1st Jan 2022 to 31st December 2024

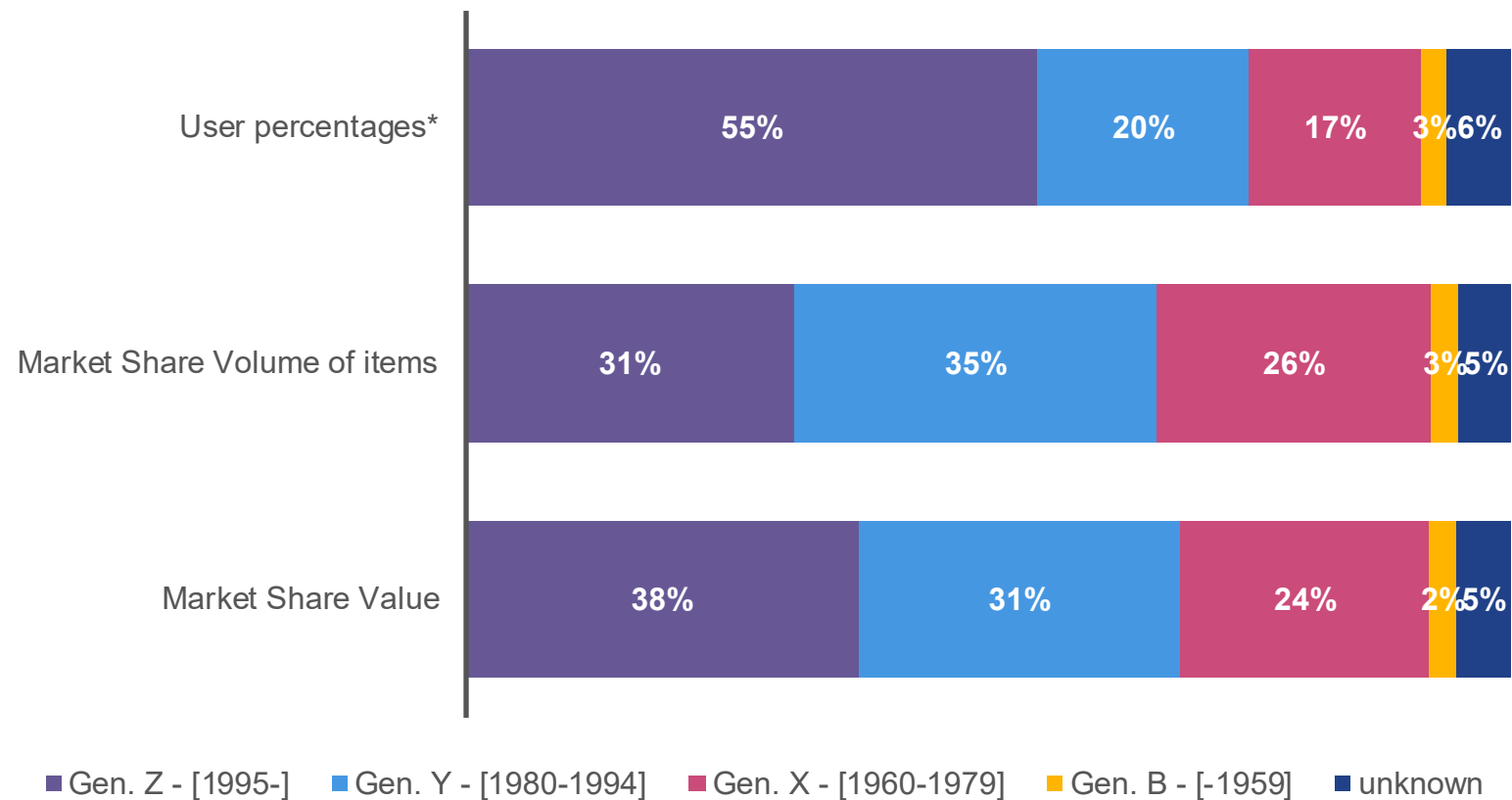
UK TikTok shopper transactional profile



Source: NIQ Digital Purchases, 52w 01.06.24

Generational Divide in TikTok Commerce: Gen Z Drives Engagement, Gen Y & X Drive Revenue

TikTok users generational Mix and purchase volume & value

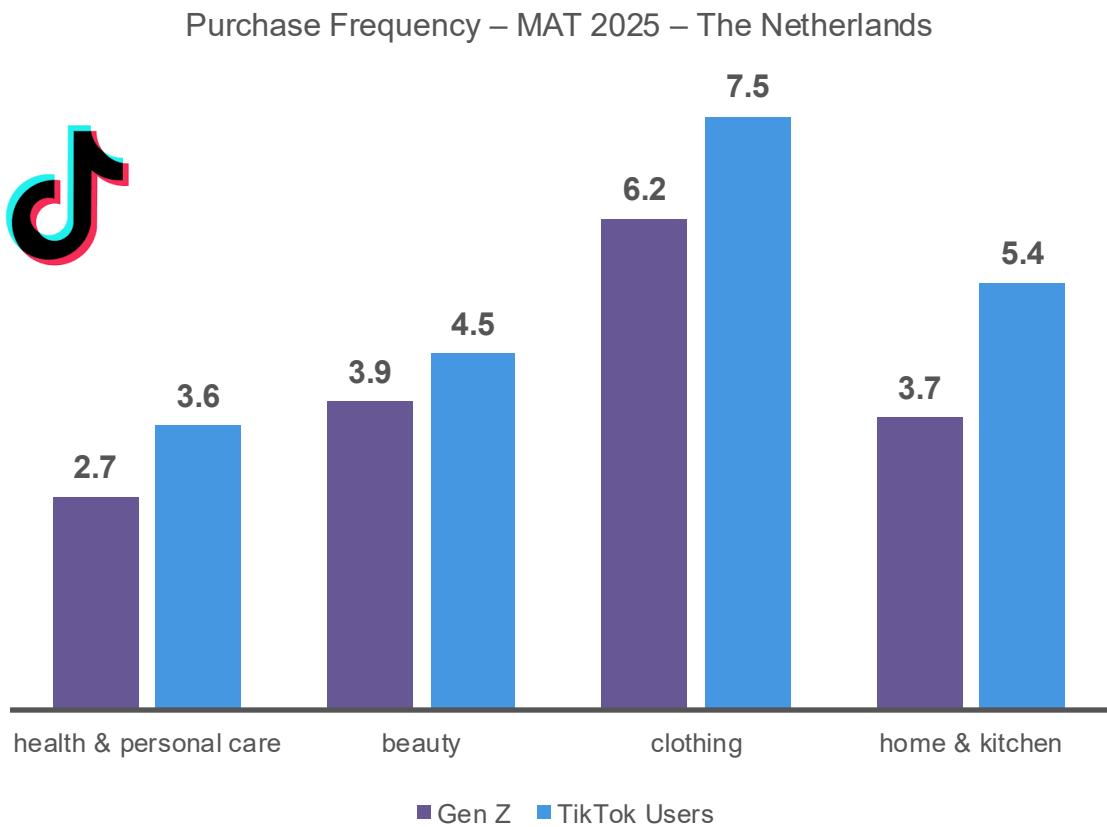


Source: NIQ Digital Purchases, 52w 01.06.24. *26,2k users captured in Digital Purchases having a TikTok account and making at least 1 e-commerce purchase MAT

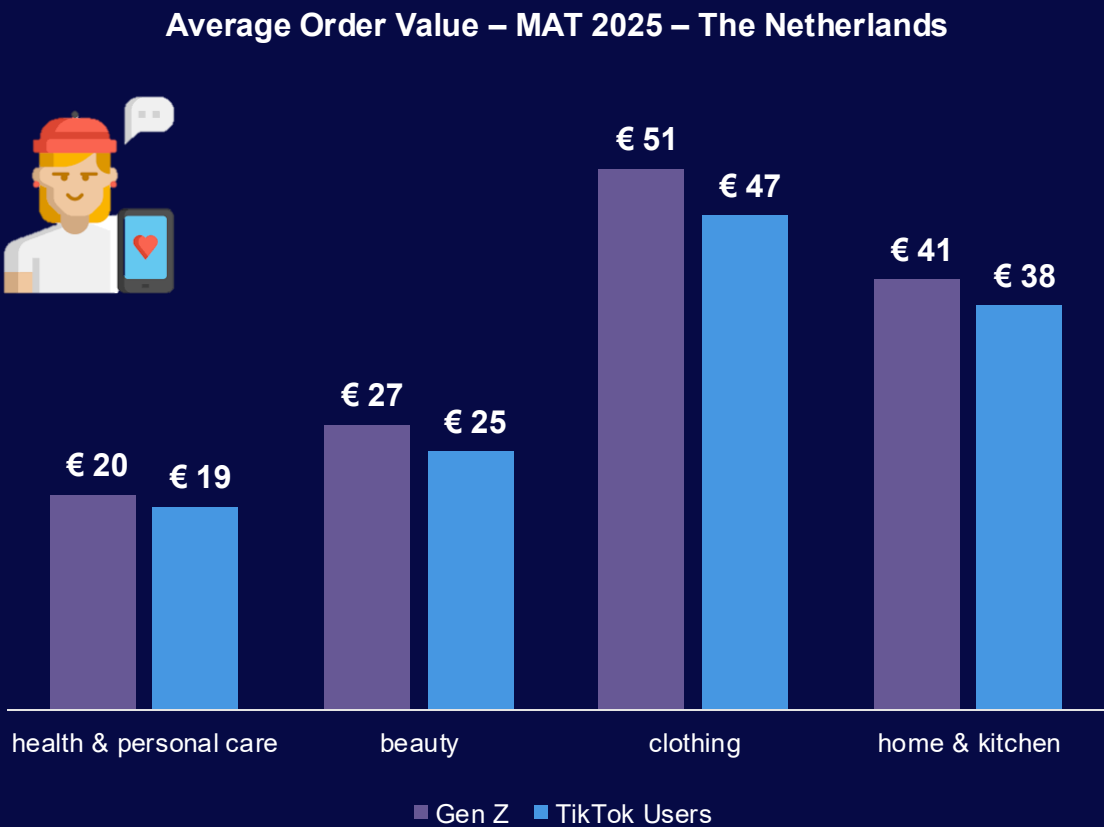


Decoding Digital Spending: TikTok's Frequent Shoppers vs. Gen Z's Big Spenders

Online purchase metrics for popular TikTok categories –
The Netherlands

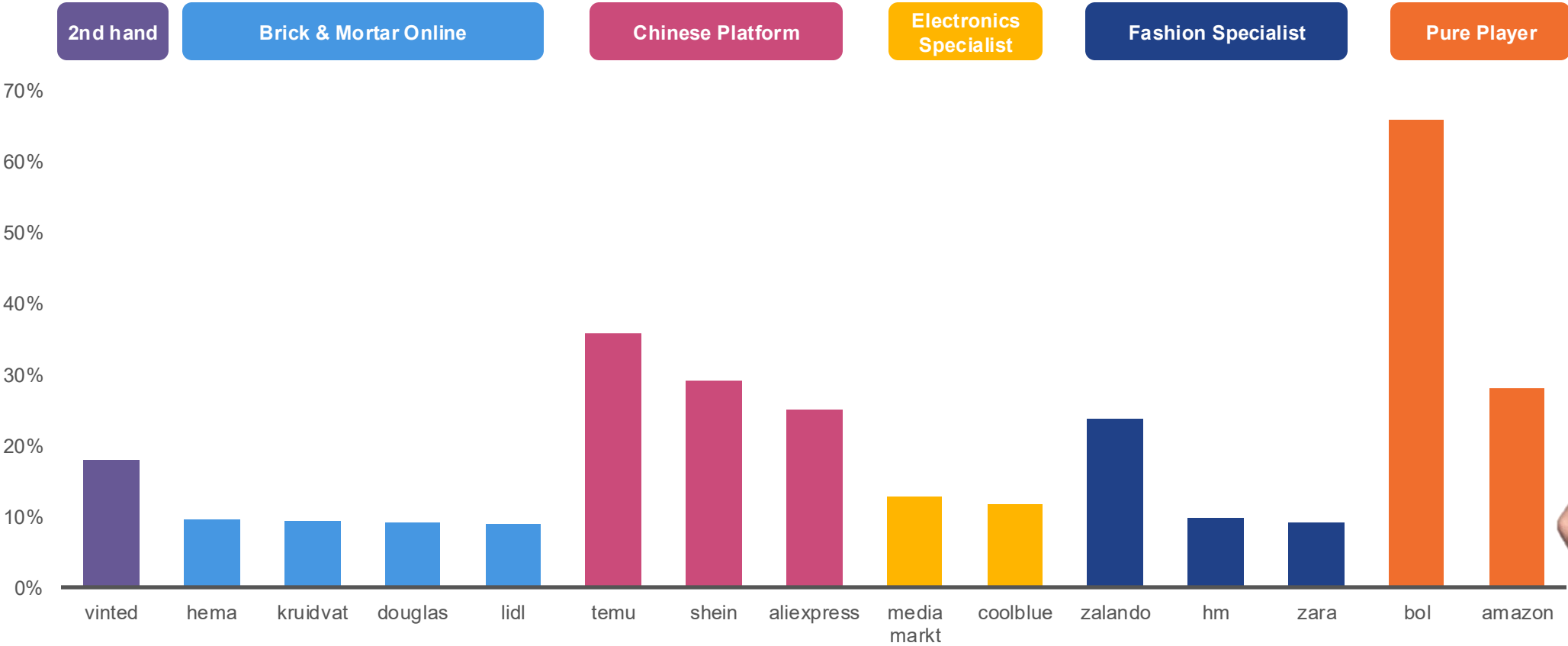


Source: NIQ Digital Purchases, 52w 01.06.25



Retail Reach on TikTok: Mapping Dutch Consumer Engagement Across E-Commerce Players

Online Retailer Penetration for Dutch TikTok users



Source: NIQ Digital Purchases, 52w 01.06.25

